



Organizational Readiness

The Critical Success Factor in an EHR
Implementation or Merger Integration

What is organizational readiness and why is it important to be mission ready?

Among the most familiar and potentially high-impact healthcare transformation projects is the implementation of an enterprise electronic health record (EHR)—whether an organization is implementing a replacement EHR, integrating EHRs because of a merger or acquisition, extending its EHR to an affiliate or partner, or becoming the recipient of an EHR. Creating a seamless flow of information can transform the way care is delivered. This can result in improved patient care and care coordination; increased patient engagement and caregiver experience; improved diagnostics and patient outcomes; and practice efficiencies, cost savings, and revenue for the services provided. Yet industry media is replete with reports of health systems that have struggled to realize these expected benefits, with some even suffering financial losses and caregiver burnout.



Outcomes from an EHR implementation are directly tied to the organization's readiness for the transformational change that this endeavor entails.

The need for organizational readiness is amplified by a number of factors.

Rapid implementation timeframes and vendor model structures are prolific and require extra work for configuration and optimization post go-live. While EHR vendors provide workplans and checklists to accelerate the implementation, the organization needs to own and lead the change with fundamental infrastructures, competencies, and capabilities to operationalize the workplan. The mere nature of integrated systems also requires an integrated end-to-end patient flow approach that considers both the clinical and revenue cycle implications of high-impact, critical workflows together. Without this, the intersections of each and downstream implications may be overlooked, causing workflow issues, negative effects on the patient experience, and potentially sizable revenue ramifications.

It is essential to address these factors early. Those that fail to do so suffer from lower adoption rates, revenue slippage, and leakage. Ultimately, they also miss the opportunity to advance market position, improve revenue and charge capture, and move the needle on care cost, quality, outcomes, and experience. Alternatively, organizations that maximize organizational readiness mitigate financial risk while realizing transformational change with the greatest measurable benefits.

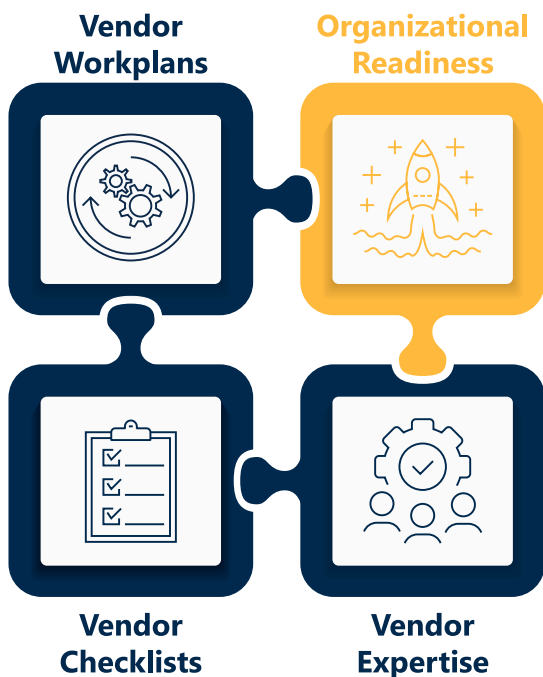
What is organizational readiness?

More than just change leadership, organizational readiness involves fully preparing stakeholders who are accountable for the work to assume ownership. Organizational readiness answers critical questions:

- Are our people ready to do their jobs effectively and at their peak performance?
- Do they have the necessary skills to do their job in the new system and with the new workflows?
- Do we fully understand the implications of new workflows and are we prepared for high-impact workflows?
- Is the system being maximized to capture operational efficiencies?
- Are the implementation and operations teams effectively working together to ensure success?
- Is communication transparent and frequent enough at all levels to prepare for this major transformation?

If the implementation is viewed as a technology project, the result could be less than favorable, with a tendency to blame IT for any and all issues. However, if the program is operationally led with technology as an enabler, the result will be ownership and accountability to drive strong outcomes. The operational engagement and ownership is critical to implementation success and to long-term sustainability and continuous improvement.

Organizational readiness works hand-in-glove with vendor workplans, checklists and expertise



Successful readiness programs:

- Create organizational adoption and buy-in.
- Facilitate effective and efficient decision-making that drives the program to on-time completion.
- Ensure that operational, financial, and other impacts are well understood.
- Establish a clear understanding of clinical and operational roles in benefits realization.
- Provide elbow-to-elbow support and facilitation for the key operational roles and executives.
- Mitigate risk by actively identifying gaps and proactively planning for resolution.

The Results

Enhanced Efficiency | Improved Quality | Better Customer Service | Improved Compliance | Greater Productivity

Varying Outcomes and Experiences Even with the Same EHR

Organization A	Organization B
Achieved a \$50 million cost savings, reduced LOS by 20%, achieved high physician satisfaction, and returned to pre-activation productivity in 2 weeks.	Posted a \$60 million loss for the quarter, experienced high physician dissatisfaction, and returned to pre-activation productivity levels only after several months.
Leveraged operational ownership with physicians, clinicians, and key operational leaders owning and driving the transformation.	Had implementations largely driven by IT with inadequate operational involvement in decisions.
Integrated clinical and revenue cycle teams, defining future state workflows so the integrated system achieved clinical and operational performance requirements/needs.	Lacked senior leadership involvement in sharing the vision and developing clear expectations and accountability for performance.
Focused on the most challenging workflows for which the vendor didn't prepare them.	Paid inadequate attention to the impacts of change and the need for frequent, transparent communication.
Focused on KPIs and areas where the organization sought to leverage the implementation to "move the needle."	Focused on feature/function out-of-the-box training rather than organizational workflow-specific training.
Had clear operational engagement and accountability at every level (from top leadership to front-line staff).	Failed to develop and execute a robust plan for benefits realization.
Integrated into training the impactful workflow changes rather than just focusing on features/functions.	Allowed teams to build/implement modules in silos.
Had deeply involved leaders who were aware of project milestones, issues/risks, and operational impacts.	Allowed relatively few people to make decisions rather than broadly engaging stakeholders in the decision-making process.
Identified and addressed fears and resistance that often exist in an initiative of this magnitude.	Suffered financial/revenue cycle implications for not clearly defining documentation expectations and querying workflow for coding.

10 Critical Factors for a Successful Readiness Program

Effective organizational readiness programs enable organizations to not only lead change but build the foundation to sustain care transformation.

1. Governance

Effective governance for an EHR implementation is operations-centric rather than IT-centric. Based on an established program vision and guiding principles, transformation governance is responsible for review and approval of clinical and operational standards and decisions. This includes workflows, content, and tools, and ensures appropriate processes are followed to promote high reliability care, reduced cost of care, and improved patient and provider experience. Multilevel and multidisciplinary governance ensures decisions are made at the right level, as close as possible to those who know the work to improve decision-making and facilitate broad engagement.

2. Aligned and Accountable Operational Leadership

Transformation success depends on aligning leadership at every level to the desired transformational change. Successful programs clearly outline and communicate leadership and management roles and accountabilities, resulting in visible and active leadership throughout the organization. Leaders must do the emotional work of preparing teams to embrace the change and also the tactical work of ensuring that teams are fully prepared to assume ownership of and accountability for new workflows, content, and tools. Their role is critical in monitoring engagement and needs, planning for and supporting go-live, celebrating successes, and ultimately assuming accountability for benefits.

3. Change Management

Often the most challenging part of any transformation program is preparing for change. With the goal of “changing hearts and minds,” robust change management guides stakeholders through the stages of change. Skilled change agents help leadership create a sense of excitement, possibility, and urgency and assure that every stakeholder feels represented, heard, and supported through the discomfort of the coming change. Ultimately, effective change management expedites movement through the stages of change, resulting in earlier and broader adoption.

4. Communications

A comprehensive communications plan must articulate deliberate and focused messages to establish the vision and goals of the program, transparently inform and educate, and drive end-user engagement and commitment. This robust communication builds trust in the organization and keeps stakeholders engaged throughout the entire process.

5. Broad, Multidisciplinary Engagement

An engaged staff is one that aligns around a shared vision, starting with the planning effort to mobilize commitment and maintaining a high level of involvement through to validation and activation. They leverage a portfolio of knowledge and tools to effect change and deliver optimum future-state design. Broad engagement of staff in planning for the future state builds consensus, trust, and credibility, and sets up the program to maximize operational alignment and engagement to achieve optimal organizational transformation.

6. Learning and Education

While the intensity of training needs varies from one initiative to the next, every initiative will require some element of training. Beyond the nuts and bolts, the key readiness questions to be answered include: How do we best train to ensure a quality experience for the user community that leads to successful adoption? How do we ensure that we target training to be relevant for every user, so that it is effective in preparing them for the new workflows and tools?

7. High-Impact Workflow Reengineering

One of the most important elements of organizational readiness is preparing for success related to high-impact workflows. Taking an in-depth look at these workflows to identify impacts and risks, actively address gaps in performance to leading practice and standardization across the enterprise, and proactively planning for mitigation exponentially increases the likelihood of a successful go-live. Still, more benefits are derived from taking time to optimize existing workflows or standardize disparate workflows across multiple facilities to advance best practices. Additionally, visual aids can be helpful to clearly articulate the change from the current state.

8. Comprehensive Super-User and Champion Program

To support the effort across all key components, it is important to build a comprehensive super-user and champion program that works hand-in-hand with the readiness team to become intimately aware of the operational changes, their impact, and how they can play a key role now and in the future state for their staff and at a leadership level. This team should also be leveraged to consider role changes and determine if new roles need to be established or if policy and procedure changes are necessary.

9. Benefits Realization

For many health systems, benefits realization is the primary reason for pursuing transformation work. To successfully realize benefits, organizations must put in place a robust benefits realization framework. Additionally, they must select KPIs that align with strategic priorities, assign operational ownership and accountability, develop monitoring and reporting tools, and create clear implementation and sustainment plans.

10. Informatics and Analytics

The ability to leverage data to derive deeper and more unique insights is a critical enabling factor in not just sustaining but driving an organization to value. It is critical there are effective analytics and informatics capabilities in place to capture, organize, disseminate, and interpret data intentionally to understand and drive process improvement and organizational performance enabled by the EHR. To drive realization of the benefits, clinical and operational owners must have the right analytics at the right time and know how to use them.

While silos of activity in each of these areas will accomplish some goals, the integration of these elements in a coordinated program becomes the secret sauce to successful organizational readiness.

All components are critical to becoming operationally ready. However, it is not enough to put each component into place individually. Additionally, the criticality of addressing clinical and revenue cycle elements together cannot be underscored enough. Complex high-impact workflows must be addressed holistically as downstream implications of missing core integration points are sizable.

Considerations Specific to EHR Extensions and Mergers and Acquisitions

In a multi-party setting, the requirements are even more complex. In particular, an EHR extension model or merger/acquisition is likely to come with distinct requirements and considerations.

For EHR extension models, decisions have long since been made by the host, and the EHR may have been implemented for some time. Extending the EHR to another organization requires carefully constructed governance and clearly defined decision rights and processes for both shared and non-shared build. There needs to be early negotiation of support strategies and service level agreements as well as robust communication strategies to inform and educate about system changes. The partner organization will need full attention to readiness—often in a compressed timeframe if limited build changes are intended—to ensure successful implementation. If both host and partner will share build and agree to significant build changes, both organizations will require significant attention to organizational readiness.

Similarly, merging deployments of an EHR when both organizations in a merger or acquisition have the same vendor or migrating to one organization's vendor requires deep organizational readiness. Defining how the combined organization will establish enterprise decision-making and governance will be critical to achieve clinical integration, operational integration, and coming together as a system. Regardless of the platform decision—whether there's a migration to one system's build, a new enterprise build, or if both EHRs are used through seamless integration—clinical and operational teams and leadership must be aligned and engaged from the start to address the required workflow and cultural changes. Actively involving all key stakeholders in cooperative efforts to design future state and prepare for the change is an important step. It cannot be an afterthought because it is key to achieving better change results, a more committed and aligned workforce, greater change capability, more sustainable operational performance, and the value creation expectations of the partnership.

Invest in Organizational Readiness Early On

In any context, investing in organizational readiness early in an EHR implementation program lifecycle will yield benefits, including risk avoidance, that far exceed the cost—both immediately upon implementation and over the long term.

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